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RDA in the UK: reflections after the CIG E-forum on RDA

Céline Carty & Helen Williams (co-moderators of the CIG E-forum on RDA)

On April 18th-19th, CIG hosted their first-ever e-forum, on the topic of RDA. E-forum discussions are regularly held by ALCTS (the Association for Library Collections & Technical Services) in the US but the CIG e-forums are a new initiative for the UK. Although people can subscribe to the email list wherever they are based geographically, the CIG committee hoped to provide a forum for discussion that would be specifically focused on the UK perspective. The CIG e-forum took place the week after the first of the CILIP Executive Briefings on RDA (in London, with a second one in Manchester at the end of May), which provided another opportunity for UK librarians and cataloguers to air questions and concerns about RDA. It has been said that RDA “must be one of the most discussed documents ever” in cataloguing history (1). It has certainly been on the horizon for several years and, in the last year since the publication of the RDA Toolkit and the start of the US RDA Test last summer, there has been no end of – sometimes heated – debate about RDA in professional literature, blogs, Twitter and especially on mailing lists such as AUTOCAT and RDA-L. However, these discussions have often been dominated by cataloguers based in North America, particularly as regards the US RDA Test, so it was very interesting to see what the general mood is among librarians and cataloguers in the UK.

There is no doubt that there is a high level of interest in all matters relating to RDA. Last year's Executive Briefings on RDA had proved enormously popular and this year's London event was no different. Over 180 people subscribed to the CIG e-forum mailing list and, during the two days of discussion, there were almost 200 emails from 39 active participants, which made for a busy and lively discussion covering lots of varied topics (2). Although the majority (68%) of active participants were from academic libraries, there were contributors from school, public and national libraries as well as LMS vendors, vendor record suppliers, third sector workers and academics. Given that there has not been an opportunity for the wider UK cataloguing community to participate in a national test (the British Library are carrying out their own internal testing), the popularity of the Executive Briefings and the CIG e-forum demonstrates a real desire among UK cataloguers to find out more, especially about the practical considerations of potential RDA implementation.

Some participants who had attended the CILIP Executive Briefings both years running commented that the mood among delegates was more positive towards RDA this year than it had been in 2010. This was probably helped by the fact that this year's events were able to talk directly about the published text of RDA, the format of the RDA Toolkit and some of the results of the US Test process. There was certainly a lot of interest in hearing about the experiences of the Library of Congress, University of Chicago and the British Library in practical, hands-on testing of, and training for, creating RDA records. An e-forum participant reported feeling relieved that the initial changes required to apply RDA in a MARC environment were not as bad as first feared. This was repeated by e-forum contributors and in feedback after the e-forum: it seems that offering opportunities to discuss RDA, particularly in practical terms, lessened anxiety about what a future implementation of RDA might bring.

In general, there was a great deal of enthusiasm for the possible development of linked data and the semantic web, which seem still quite a long way in the future. Discussion at the Executive Briefing had returned more than once to the limitations of the MARC format and the need to prepare (and possibly lead the way) for a move to a post-MARC cataloguing future. The emphasis RDA places on recording relationships would contribute to all of these developments, both within and outside the library world. The contributors to the e-forum were keen to see examples of FRBRised catalogues or RDA environments, in order to visualise these possibilities more clearly.

It came as no surprise to anyone that there are a large number of concerns among UK cataloguers relating to costs, namely the cost of the RDA Toolkit itself and the cost in time and lost productivity of possible implementation. Several delegates at the Executive Briefing had expressed serious concerns about the cost of the Toolkit, the need for an annual subscription (a change from the situation with AACR2) and the difficulty of calculating the required level of concurrent users. These issues were also raised during the e-forum, with specific worries about smaller institutions being unable to afford the Toolkit. This could lead to a situation where there was a split between the library “haves” and the library “have-nots”. The fact that RDA was a

“closed” standard came in for some criticism.

Very few institutions have taken out a subscription to the RDA Toolkit beyond the free access period in summer 2010 and it was pointed out several times how hard it was to argue for extra costs at a difficult time for library budgets in all sectors. Lack of access has meant that the majority of cataloguers and managers felt that they had not been able to familiarise themselves with RDA itself or the Toolkit functionality, or to get a better idea of what their future subscription needs might be. It was pointed out that it could even be difficult to follow RDA-related discussions on mailing lists such as AUTOCAT without access to the text. Quite a few participants suggested they would be considering taking out a subscription in the next few months, while others had settled for the print version in the meantime. It is worth noting that since the e-forum took place, the RDA Toolkit publishers have announced a one-time 30-day free trial (3) as well as 30-day post-event free access for people attending an RDA workshop or presentation (4).

The general attitude towards RDA in the UK can probably be summed up by “wait and see”. The majority of participants reported that they were waiting to see the outcome of the US RDA Test and to hear the implementation decisions of the US and UK national libraries. The general uncertainty about implementation as well as a lack of time and resources has meant that very few cataloguing managers are actively planning local training at the moment, though many are doing all they can to keep themselves informed of RDA developments. There was some discussion of how best to time any training: it was felt important not to start too soon when there is so much still uncertain but, at the same time, many felt they wanted to raise general awareness of RDA and FRBR with their cataloguing staff. A repeated concern from all sectors was a lack of time to plan and carry out training, as well as the need – in a time of “doing more with less” – to maintain cataloguing output and productivity levels. There were also aspects of RDA itself which might lead to lost productivity, even after an initial period of familiarisation and training: for example, loss of the “rule of 3” with resulting increases in authority work and increased keystrokes with the loss of abbreviations.

Despite this many UK cataloguers seem to be starting to think about the practicalities of future RDA implementation. There was discussion of the need to think about issues relating to record matching and deduplication, and the topics which will need discussing with record vendors and LMS suppliers, who will be operating in an environment where clients might switch to RDA at different times or not at all. Concerns were also raised about the implications for authority control. However, it was probably the increased emphasis on cataloguer’s judgement that caused the most discussion as many cataloguers felt there was an increased need for consistency in a cataloguing environment which relies so much on shelf-ready or “fast cataloguing” type workflows and accepting records from external sources. The issue of options and cataloguer’s judgement also raised problems for drawing up local policies and guidelines as well as training, particularly for paraprofessional staff. There were also concerns about the possibility of the British Library and the Library of Congress applying various RDA options and alternatives in different ways, which would leave the majority of UK libraries needing to decide which way to follow. General implementation of RDA may cause problems for the not-inconsiderable number of libraries still using UKMARC, which is no longer being updated and therefore cannot be made to accommodate new fields for RDA.

Another issue raised by implementation discussions was the hybrid environment that several speakers at the Executive Briefing warned was already in existence, with some US libraries having decided to continue cataloguing in RDA (University of Chicago, Stanford and Brigham Young University) once the test period was over. This hybrid situation is only likely to increase as libraries make implementation decisions at different times. The e-forum revealed that libraries in the UK are currently dealing with any incoming RDA records differently, with some libraries leaving them untouched, but more who have produced documentation about how to convert these to AACR2.

The e-forum generated many helpful suggestions for possible training, a particularly important factor being keeping costs as low as possible in these constrained financial times. Several contributors talked about what they would like to see offered by CIG, such as training on RDA basics and FRBR (many felt FRBR was quite a new concept to them), and record examples, particularly comparing AACR2 records to RDA ones. Suggestions

as to how CIG could provide this included regional training to reduce travel and accommodation costs, or online materials that can could be paid for and used to deliver in-house training. In particular, Anne Welsh (UCL) suggested using the format of an e-forum itself to deliver some practical hands-on training, where participants were able to create sample RDA records and then compare and discuss them together. This suggestion, and all the others, gathered very enthusiastic responses from participants during the e-forum and will be actively pursued by the CIG committee, who are very keen to provide useful, affordable and practical training on RDA and FRBR. It also garnered some specific praise from a US cataloguing blogger who had followed the e-forum:

“You guys at CILIP/CIG are great! I’ve been in a fair few forums in my life, and of late several to do with RDA. However, this forum impressed me most of all. Why? Sharing. The suggestions and ideas in this forum are lovely” (5).

At the start of the Executive Briefing, Anne Welsh described UK cataloguers as “a community that helps each other” and, despite all the uncertainty around RDA and the differences of opinion it generates, the CIG e-forum did reveal a real enthusiasm for cooperation and sharing, whether it was relating to documentation or training. We were delighted with the response and feedback we have had as co-moderators and the CIG committee look forward to hosting another e-forum on a different topic in the next couple of months.

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